

LAST REVISED DATE: 03/21/2018

General Information

Task	Process Information
Creating a Change Order for an Express Purchase Order	<p>When you update an Express PO that has been dispatched, you create or append a change order in GEARS. Additions, deletions, and/or changes to an Express PO line or schedule will create a change order. Updates to an Express PO may include things such as:</p> <ul style="list-style-type: none"> • Increase price/amount or quantity • Add a line to a PO, <u>OR</u> • Change distribution or shipping information <p>NOTE: Changes to Express POs may require that the Express PO be (1) resubmitted for approval; (2) budget checked; and (3) Dispatched.</p>

GEARS Navigation

Purchasing > Purchase Orders > Add/Update Express POs	<div> Favorites ▼ Main Menu ▼ > Purchasing ▼ > Purchase Orders ▼ > Add/Update Express POs </div>
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1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	Locate the existing Express PO that you want to update by selecting the "Find an Existing Value" Tab.	<p>Express Purchase Order</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <div> Find an Existing Value Add a New Value </div>

2.

Enter the PO number or enter fields in the Search Criteria.

In this example, PO ID 0000061153 is entered.

Express Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

▼ Search Criteria

Business Unit

MDJUD

PO ID

begins with 0000061153

Purchase Order Date

PO Status

Short Vendor Name

begins with

Vendor ID

begins with

Vendor Name

begins with

Buyer

begins with

Buyer Name

begins with

PO Type

Purchase Order Reference

begins with

Hold From Further Processing

☐

Case Sensitive

☐

Search

Clear

Basic Search

Save Search Criteria

3.

Click the

Search

button.

4a.

For “Amount Only” Express POs –

NOTE: Steps 4a through 4e allow you to change the amount of the Express PO.

The Express PO MUST be “Amount Only” to change the amount. Click on the Line Details icon to confirm.

Express Purchase Order

Purchase Order

Business Unit

MDJUD

PO ID

0000061153

Copy From

PO Status

Dispatched

Budget Status

Valid

Hold From Further Processing

▼ Header

*PO Date

02/21/2017

Vendor Search

*Vendor

SHURAINC-001

Vendor Details

*Vendor ID

0000013507

SHURA INC

*Buyer

FIELD_BUYER

PO Reference

Catering Services

Header Details

Activity Summary

PO Defaults

Add Comments

PO Activities

Add ShipTo Comments

Requisitions

Document Status

Actions

Backorder Status

Not Backordered

Create BackOrder

Receipt Status

Received

*Dispatch Method

Print

Dispatch

Amount Summary

Merchandise

3,000.00

Freight/Tax/Misc.

0.00

Total Amount

3,000.00

USD

Encumbrance Balance

3,000.00

USD

Calculate

Add Items From

Catalog

Purchasing Kit

Item Search

Select Lines To Display

Search for Lines

Line

To

Retrieve

Lines

Line

Item

Description

PO Qty

*UOM

Category

Merchandise Amt

Status

1

Food Services Judiciary Grants Conference 213 characters remaining

1.0000

EA

0401

3,000.00

Approved

Schedules

Sched

*Due Date

*Ship To

*PO Qty

Price

Merchandise Amt

Status

*Distribute by

1

02/01/2017

JIS - MAIN

1.0000

3,000.00000

3,000.00

Active

Amount

Distributions

Chartfields

Details/Tax

Asset Information

Req Detail

Statuses

Budget Information

Personalize

Find

View All

Dist

Status

Percent

Merchandise Amt

Curr

*GL Unit

Batch

PCA

Fund

*Account

Program

Approp Number

Approp

1

Open

100.0000

3,000.00

USD

MDJUD

C25

90001

0001

0401

B009

AD009

AY2017

Expand All

Collapse All

View Printable Version

View Approvals

Go to ... More ...

Under the Attributes section:

Confirm that the Amount Only checkbox is turned on.

Attributes

Physical Nature

Goods

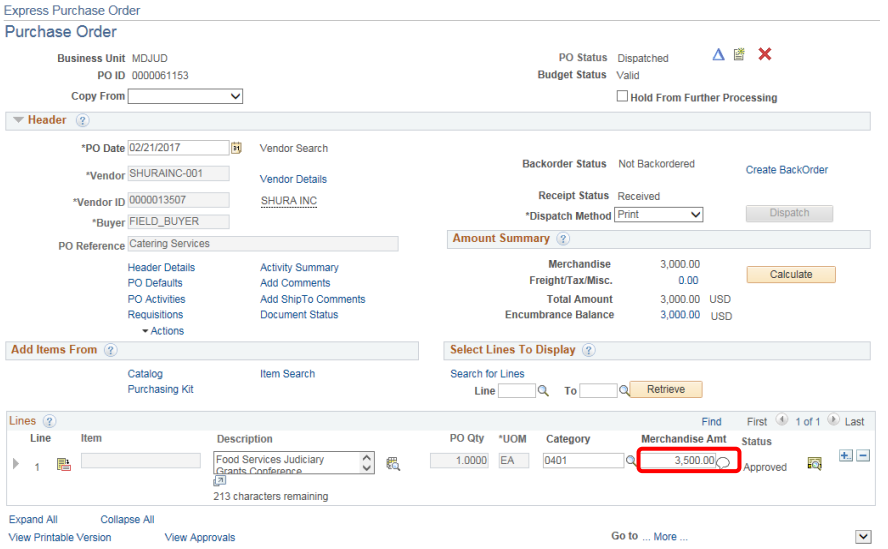

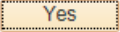
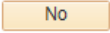
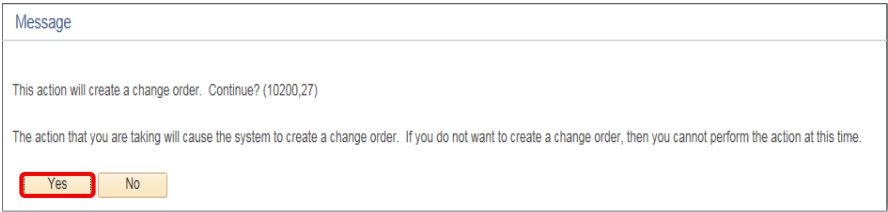
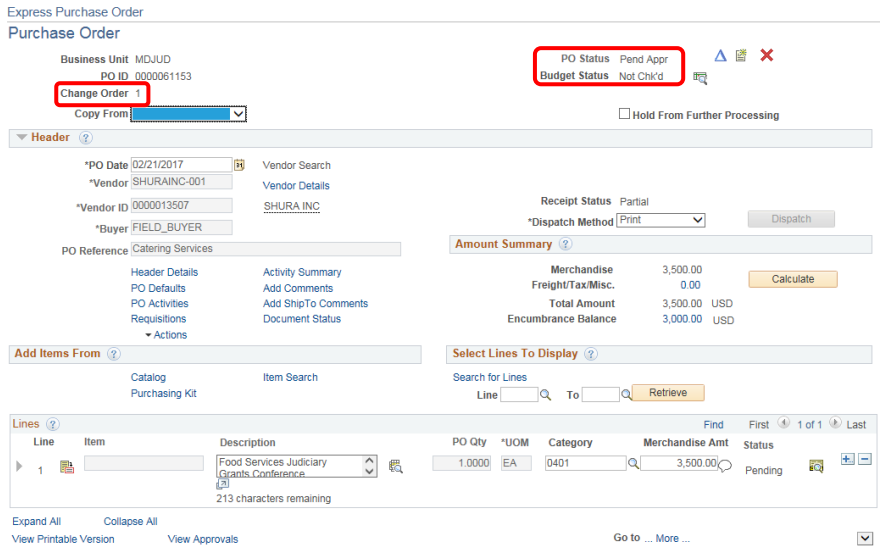
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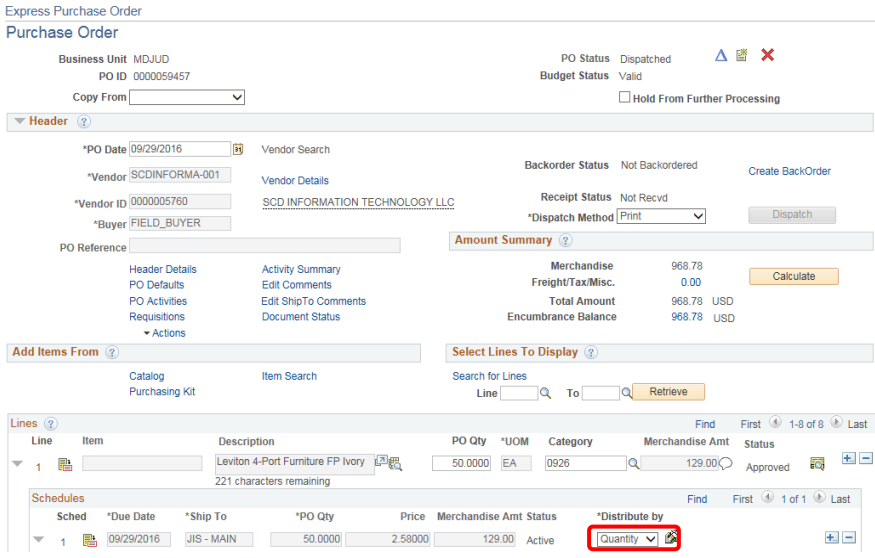
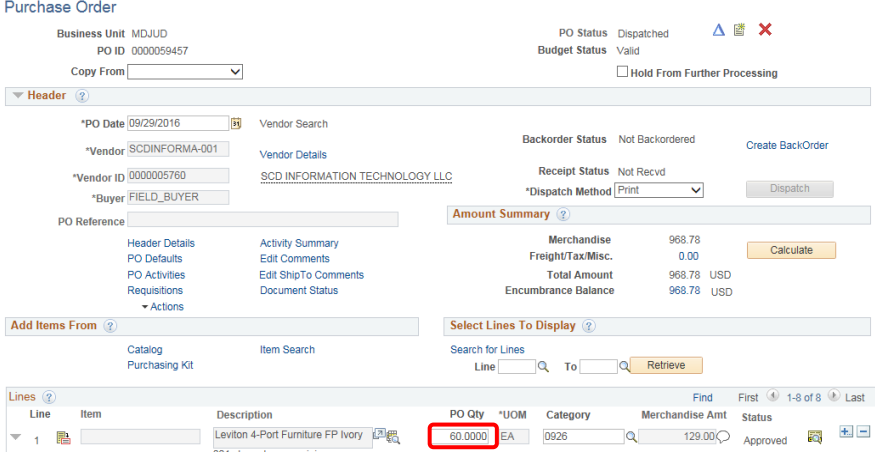

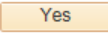

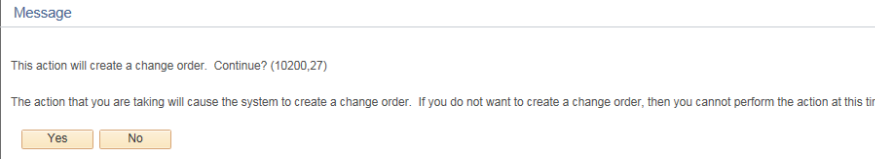
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
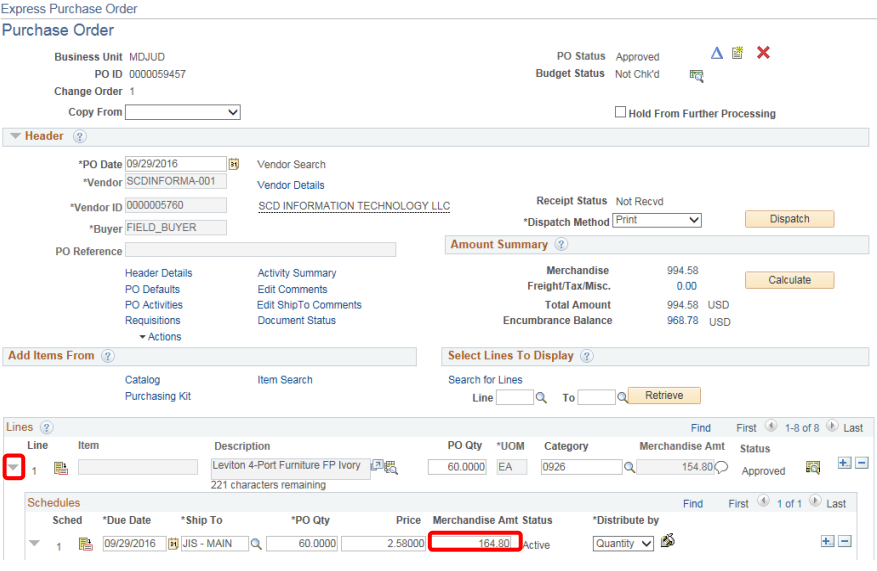
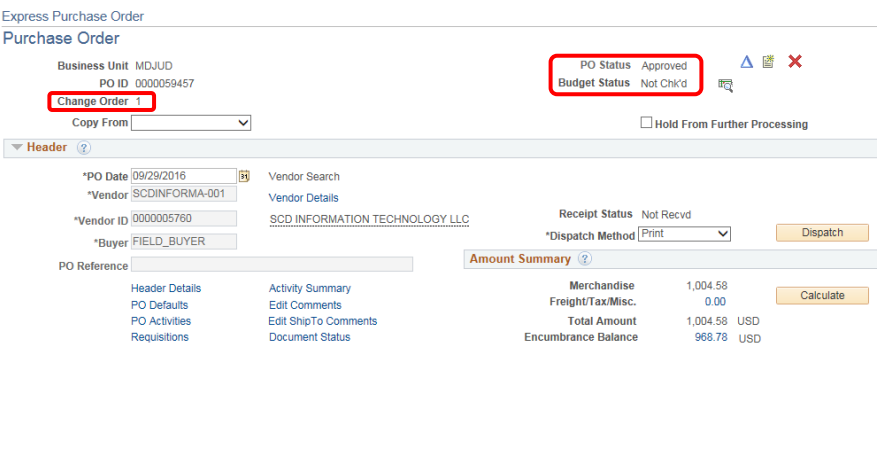

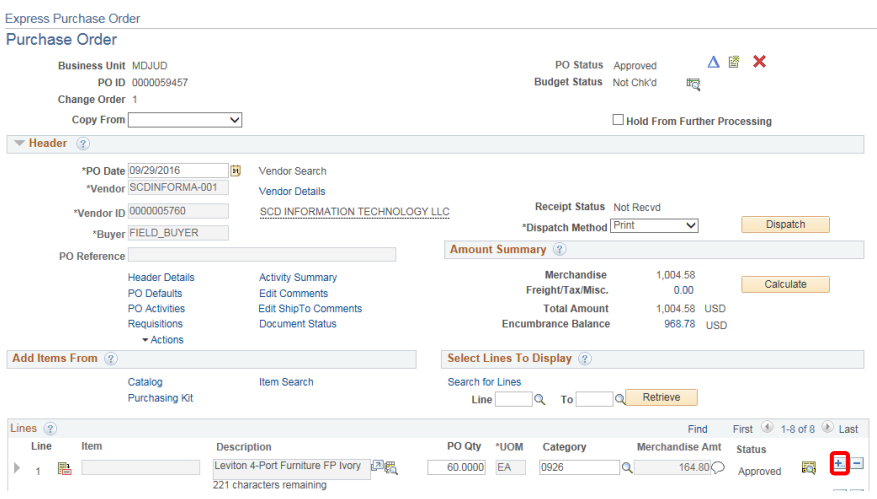
*Price Date

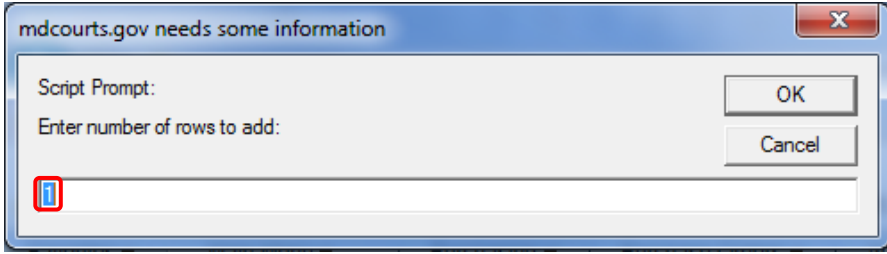
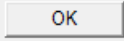
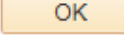
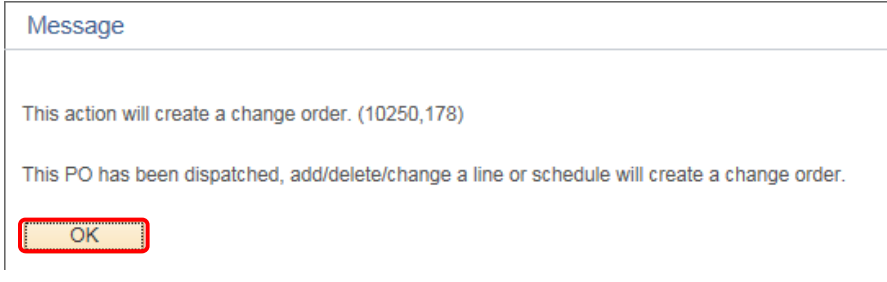
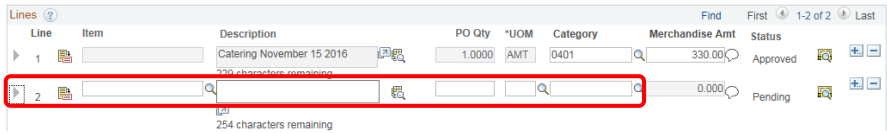
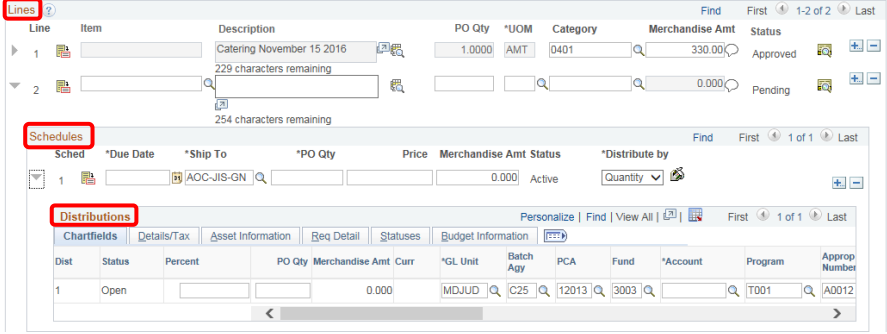
PO



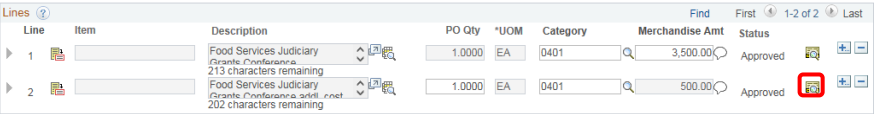
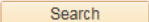
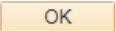
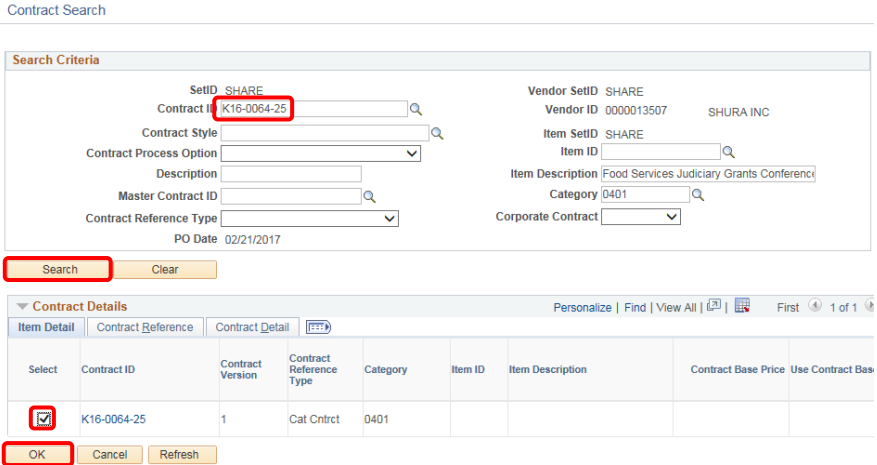
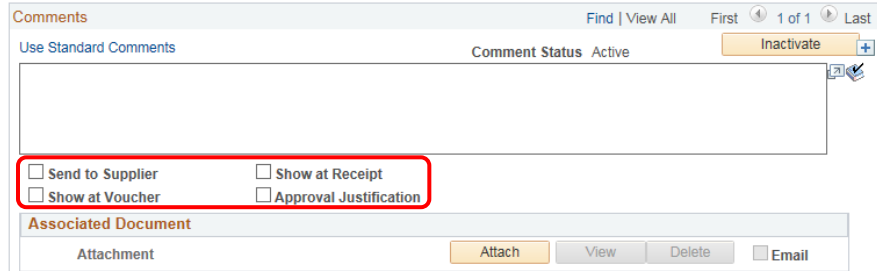
☒ Amount Only


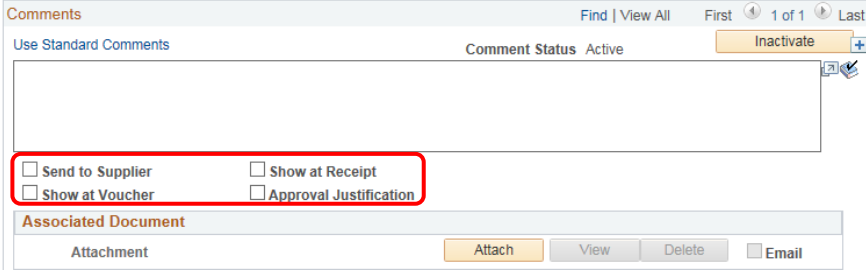






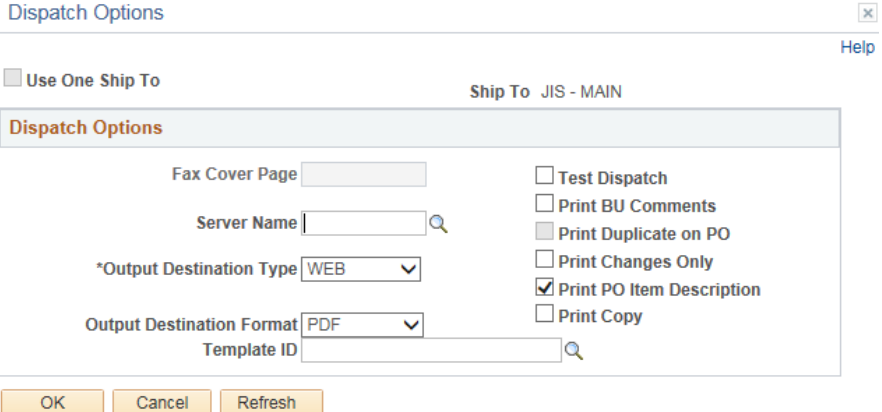

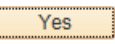
<p>4b.</p> <p>For “Amount Only” Express POs –</p> <p><u>Express Purchase Order</u></p> <p>On the <u>Purchase Order</u> screen, enter the amount change on the PO line.</p> <p>In this example, the PO Line 1 was increased from \$3,000.00 to \$3,500.00.</p>	 <p>The screenshot shows the 'Express Purchase Order' interface. At the top, the PO Status is 'Dispatched' and Budget Status is 'Valid'. The PO ID is 0000061153. The PO Reference is 'Catering Services'. The PO line 1 is selected, showing a description of 'Food Services Judiciary Grants Conference' with a quantity of 1.0000 and a unit of measure of 'EA'. The Merchandise Amt is highlighted with a red box and shows a value of 3,500.00. The Amount Summary table shows a Total Amount of 3,000.00 USD.</p>
<p>4c.</p> <p>For “Amount Only” Express POs –</p> <p>Click the  button.</p>	
<p>4d.</p> <p>For “Amount Only” Express POs –</p> <p>A system message will display noting that the action will create a change order. To proceed with the change, click the  button.</p> <p>NOTE: If you select the  button, the system will not accept your changes and the field will remain unchanged.</p>	 <p>The screenshot shows a 'Message' dialog box with the text: 'This action will create a change order. Continue? (10200,27)'. Below the text are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red box.</p>
<p>4e.</p> <p>For “Amount Only” Express POs –</p> <p>If the PO saves successfully, the PO Status changes from ‘Dispatched’ to either ‘Approved’ or ‘Pending Approval’ (depending upon the total dollar amount of the PO), and the Budget Status changes from ‘Valid’ to ‘Not Chk’d’.</p> <p>**Skip to Step 8 to continue processing the Change Order for the Express PO amount change.</p>	 <p>The screenshot shows the 'Express Purchase Order' interface after saving. The PO Status is now 'Pend Appr' and Budget Status is 'Not Chk'd'. The PO ID is 0000061153. The PO Reference is 'Catering Services'. The PO line 1 is selected, showing a description of 'Food Services Judiciary Grants Conference' with a quantity of 1.0000 and a unit of measure of 'EA'. The Merchandise Amt is highlighted with a red box and shows a value of 3,500.00. The Amount Summary table shows a Total Amount of 3,500.00 USD.</p>

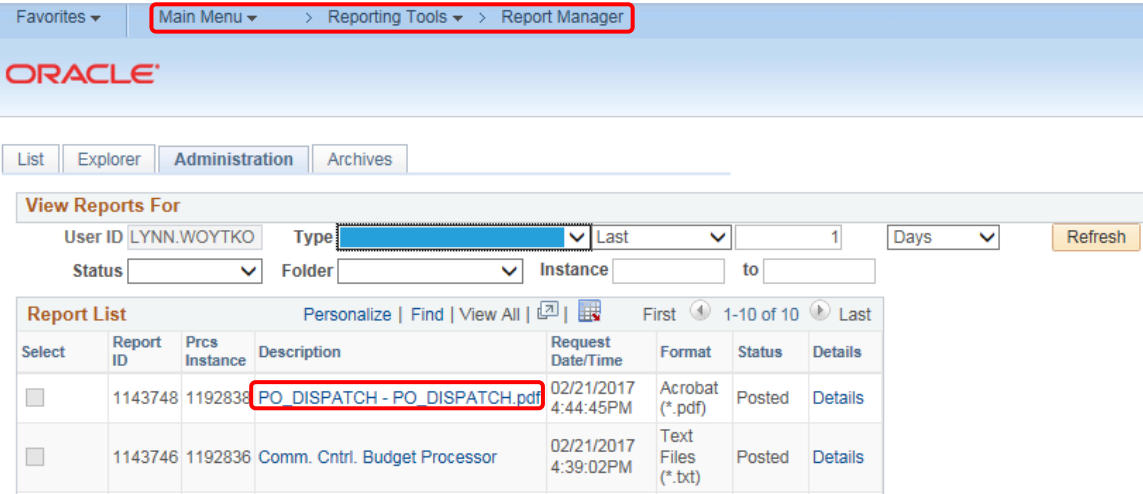
<p>5a.</p> <p>For “Quantity-Based” Express POs –</p> <p>NOTE: Steps 5a through 5f allow you to <u>change the quantity or price of the Express PO.</u></p> <p>The Express PO <u>MUST</u> be distributed by <u>Quantity</u> to change the quantity or price.</p> <p>In this example, PO ID 0000059457 is selected and the PO Quantity will be increased.</p>		 <p>Express Purchase Order Purchase Order</p> <p>Business Unit MDJUD PO ID 0000059457 Copy From [v]</p> <p>PO Status Dispatched Budget Status Valid [x] Hold From Further Processing</p> <p>Header [?] *PO Date 09/29/2016 Vendor Search *Vendor SCDINFORMA-001 Vendor Details *Vendor ID 0000005760 SCD INFORMATION TECHNOLOGY LLC *Buyer FIELD_BUYER PO Reference Header Details Activity Summary PO Defaults Edit Comments PO Activities Edit ShipTo Comments Requisitions Document Status Actions</p> <p>Amount Summary [?] Merchandise 968.78 Freight/Tax/Misc. 0.00 Total Amount 968.78 USD Encumbrance Balance 968.78 USD Calculate</p> <p>Add Items From [?] Select Lines To Display [?] Catalog Purchasing Kit Item Search Search for Lines Line [] To [] Retrieve</p> <p>Lines [?] Line Item Description PO Qty *UOM Category Merchandise Amt Status 1 [] Leviton 4-Port Furniture FP Ivory 50.0000 EA 0926 129.00 Approved 221 characters remaining</p> <p>Schedules Sched *Due Date *Ship To *PO Qty Price Merchandise Amt Status *Distribute by 1 09/29/2016 JIS - MAIN 50.0000 2.58000 129.00 Active Quantity [x]</p>
<p>5b.</p> <p>For “Quantity-Based” Express POs –</p> <p>Express Purchase Order Purchase Order</p> <p>On the <u>Purchase Order</u> screen, enter the quantity change on the PO line.</p> <p>In this example, the PO Qty was increased from 50 to 60.</p>		 <p>Express Purchase Order Purchase Order</p> <p>Business Unit MDJUD PO ID 0000059457 Copy From [v]</p> <p>PO Status Dispatched Budget Status Valid [x] Hold From Further Processing</p> <p>Header [?] *PO Date 09/29/2016 Vendor Search *Vendor SCDINFORMA-001 Vendor Details *Vendor ID 0000005760 SCD INFORMATION TECHNOLOGY LLC *Buyer FIELD_BUYER PO Reference Header Details Activity Summary PO Defaults Edit Comments PO Activities Edit ShipTo Comments Requisitions Document Status Actions</p> <p>Amount Summary [?] Merchandise 968.78 Freight/Tax/Misc. 0.00 Total Amount 968.78 USD Encumbrance Balance 968.78 USD Calculate</p> <p>Add Items From [?] Select Lines To Display [?] Catalog Purchasing Kit Item Search Search for Lines Line [] To [] Retrieve</p> <p>Lines [?] Line Item Description PO Qty *UOM Category Merchandise Amt Status 1 [] Leviton 4-Port Furniture FP Ivory 60.0000 EA 0926 129.00 Approved</p>
<p>5c.</p> <p>For “Quantity-Based” Express POs –</p> <p>Click the  button.</p>		
<p>5d.</p> <p>For “Quantity-Based” Express POs –</p> <p>A system message will display noting that the action will create a change order. To proceed with the change, click the  button.</p> <p>NOTE: If you select the  button, the system will not accept your changes and the field will remain unchanged.</p>		 <p>Message</p> <p>This action will create a change order. Continue? (10200,27)</p> <p>The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time</p> <p>Yes No</p>

<p>5e.</p> <p>For “Quantity-Based” Express POs –</p> <p>Once the quantity has been changed, it is now possible to change the price (if needed). If a price change is not needed, skip this step.</p> <p>Express Purchase Order</p> <p>On the Purchase Order screen, expand the Schedule Section, and enter the price change on the PO line.</p> <p>In this example, the Price was increased from 154.80 to 164.80.</p> <p>Click the  button.</p>		 <p>The screenshot shows the 'Express Purchase Order' screen for PO ID 0000059457. The 'Change Order' is set to 1. The PO line is expanded, and the 'Price' field is highlighted with a red box, showing a change from 154.80 to 164.80. The 'Amount Summary' section shows the updated total amount of 994.58 USD.</p>
<p>5f.</p> <p>For “Quantity-Based” Express POs –</p> <p>If the PO saves successfully, the PO Status changes from ‘Dispatched’ to either ‘Approved’ or ‘Pending Approval’ (depending upon the total dollar amount of the PO), and the Budget Status changes from ‘Valid’ to ‘Not Chk’d’.</p> <p>**Skip to Step 8 to continue processing the Change Order for the Express PO quantity/price change.</p>		 <p>The screenshot shows the 'Express Purchase Order' screen after the change order is saved. The 'PO Status' is now 'Approved' and the 'Budget Status' is 'Not Chk'd', both highlighted with red boxes. The 'Change Order' remains set to 1. The 'Amount Summary' section shows the updated total amount of 1,004.58 USD.</p>
<p>6a.</p> <p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>NOTE: Steps 6a through 6h allow you to add a line to the Express PO.</p> <p>In this example, PO ID 0000055489 is selected.</p> <p>Express Purchase Order</p> <p>On the Purchase Order screen, click the  plus sign button in the Lines section.</p>		 <p>The screenshot shows the 'Express Purchase Order' screen for PO ID 0000055489. The 'plus sign' button in the 'Lines' section is highlighted with a red box, indicating where to click to add a new line to the PO.</p>

<p>6b.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>Confirm the number of rows to be added. If one row is to be added, leave the default, ‘1’ in the field.</p> <p>In this example, only one row will be added to the Express PO.</p>	
<p>6c.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>Click the  button.</p>	
<p>6d.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>A system message will display noting that the action will create a change order. To proceed with the change, click the  button.</p>	
<p>6e.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>On the Express Purchase Order Purchase Order screen, the new PO line is added.</p>	 <p>In this example, this PO had 1 PO line and a 2nd line was added.</p>
<p>6f.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>On the Express Purchase Order Purchase Order screen:</p> <p>The following are required fields:</p> <ul style="list-style-type: none"> Lines: Description, PO Qty, UOM, Category. Schedules: Due Date, Ship To, Price/Merchandise Amt. <p>NOTE: If UOM on the line is anything other than “AMT”, enter the unit price in the “Price” field, else enter the amount in the “Merchandise Amt” field.</p> <ul style="list-style-type: none"> Distributions: Account, Batch Agy, Fund, Program, Approp #, Approp Yr & PCA. 	 <p>For additional information of how to complete a PO Line, refer to the Tip Sheet, Creating an Express Purchase Order on the GEARS website (http://mdcourts.gov/gears/pdfs/tipsheetcreatingexpresspo.pdf)</p>

6g.	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>Click the  button.</p>	
6h.	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>If the PO saves successfully, the PO Status changes from ‘Dispatched’ to either ‘Approved’ or ‘Pending Approval’ (depending upon the total dollar amount of the PO), and the Budget Status changes from ‘Valid’ to ‘Not Chk’d’.</p>	<div data-bbox="708 369 1011 443"> <div>PO Status Approved</div> <div>Budget Status Not Chk'd</div> </div> <p>**Proceed to Step 7 to continue processing the Change Order for adding a line to the Express PO.</p>
7a.	<p>To associate your new PO lines with a Contract (if necessary) -</p> <p>Associate your new PO lines with a Contract (if necessary) by clicking on the .</p>	
7b.	<p>To associate your new PO lines with a Contract (if necessary) -</p> <p>Enter the Contract ID and then click .</p> <p>Select the contract by clicking on the <input checked="" type="checkbox"/> and then click .</p> <p>Now the PO line is associated with the Contract.</p>	
8.	<p>To add additional comments or supporting attachments:</p>	<p>General Express PO comments/attachments:</p> <ul style="list-style-type: none"> click the Add Comments Header link. select a group to display your comments to.  <p>Line specific comments/attachments:</p>

		<ul style="list-style-type: none"> click the  icon to the right of the Express PO Line. select a group to display your comments to.  <p>Click the  button.</p>
9.	<p>NOTE: You cannot move forward with the remaining steps unless the Express PO is in “Approved” status.</p> <p>Budget Check your Express PO.</p>	<p>NOTE: Only upon an “Approved” PO Status will you be able to run the Budget Check process by clicking the Budget Check icon .</p> 
10.	<p>Dispatch your Express PO.</p>	<p>NOTE: Only upon an “Approved” PO Status and a “Valid” Budget Status will you be able to run the Dispatch process by clicking the  button.</p> <p>Dispatching your Express PO is <u>required</u> in order to Receive and Voucher against the Express PO.</p>  <p>NOTE: The Dispatch Method defaults to “Print” but can be changed to “Email” for those vendors who have an email address associated with their vendor information on the Vendor Master File maintained by DBF.</p> 
11.	<p>Confirm the Dispatch Options & complete your Express PO.</p> <p>NOTE: You can click “No” rather than waiting for the Dispatch process to complete, however you will have to look up your Express PO to view the Dispatched status.</p>	<p>Dispatching via the “Print” method will display the following Dispatch Options.</p>  <p>There is no need to alter these options, just click the  button, then select  on the pop-up message to wait for the Dispatch process to</p>

		complete. Waiting for this process to complete will allow you to view the Express PO status as Dispatched.
12.	Your Express PO is complete.	<p>You will see the PO Status as “Dispatched” when the Dispatch process completes.</p> <p style="text-align: center;"> PO Status Dispatched Budget Status Valid </p> <p>NOTE: The Express Purchase Order must have these statuses to be received and vouchered against.</p>
13.	<p>Once Dispatched, you can review the PDF version of the Express Purchase Order in your Report Manager under the Administration Tab. Navigation: Reporting Tools > Report Manager</p> 	



End of Document

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer to the appropriate User Procedures and/or online references for any corresponding policies regarding this process.